



SOLUTION OVERVIEW

Kofax Robotic Process Automation

As a business leader, how would you like to implement technology that makes your processes more efficient and precise and frees your workforce from routine, manual, time-consuming tasks—without changing your existing systems? How about eliminating the burden your department feels when managing data and content from many different systems that can't interact without manual intervention? This is all possible with Robotic Process Automation, or RPA.

Since RPA software works with your existing systems—unlike traditional IT or workflow automation software that requires complex programming—RPA can learn and create software robots by mimicking routine tasks. Several software robots, or bots, can work together with speed and accuracy to adapt and then adopt repetitive, remedial tasks, effectively becoming your digital workforce. This digital workforce removes the barriers that hinder your employees from being more strategic, customer focused and innovative.

Automate Key Business Processes with Robotic Process Automation

Automating processes can expedite routine finance, procurement, supply chain management, accounting, customer service and human resources tasks such as entering data, issuing purchase orders, creating online access credentials or other tasks that require data from multiple different applications, sources or information formats.

Kofax RPA provides the most complete and scalable robotic process automation platform from a single vendor. The Kofax RPA platform combines artificial intelligence (AI), machine learning, capture, OCR and advanced analytics, delivered in three integrated business-focused components, to automate information-intensive processes across your enterprise:

1. **Robotic process automation** eliminates repetitive, manual tasks and processes like copying and pasting between systems, portals and documents, gathering information from around the web, and integrating information between external and internal sources. Software “bots” interact with any number of applications or data sources, initiate



responses and communicate with other systems just like a human worker. This robotic digital workforce handles mundane, repetitive work at a much faster speed, eliminates manual mistakes and frees your employees to focus on higher-value work like customer service, exception handling and business performance analysis.

2. **Cognitive document automation (CDA)** uses information capture, artificial intelligence (AI), machine learning and OCR to automate the acquisition, understanding and integration of documents needed in business processes, enabling organizations to automate a greater number of tasks and document processing. With powerful machine learning intelligence to learn and process unstructured data (such as emails and images), it takes the guesswork out of complex information processing and dynamically adapts to your evolving data processes to deliver the greatest accuracy, efficiency and consistency for your evolving processes.
3. **Advanced process intelligence analytics** enables users to monitor, analyze and optimize robotic process automation operations. Users can gain insight into business process patterns of execution and see how they impact key performance metrics, such as document processing costs or customer satisfaction. Users can see process execution in the context of their business metrics and gain much greater visibility into process patterns, enabling actionable analytics to drive process improvement.

With Kofax RPA, organizations can:

Achieve Operational Excellence

The market's most advanced robotic process automation empowers you to achieve operational excellence with your workforce of the future—combing the desired mix of employees and digital robots

Improve Customer Engagement

Efficient, accurate, timely processes optimize the quality of your customer engagement and improve customer loyalty and retention.

Reduce Business Costs

Integrated legacy systems and streamlined processes maximize the efficiency of your employee and digital workforce and drastically reduce business costs

Mitigate Compliance Risk

Reliable, accurate, efficient and traceable procedures such as verifications, regulatory updates, reporting and notifications reduce or remove risk.

Increase Competitiveness, Growth and Profitability

Driving innovation and growing market share and profits begins with reducing inefficiencies within your own business, then using a new technology like RPA to disrupt the prevailing business model.

[Key Advantages of Kofax RPA](#)

Superior scalability and lowest total cost of ownership

Our proven architecture enables organizations to build and manage thousands of software robots—delivering greater scalability and flexibility with the lowest total cost of ownership.

Design environment easy enough for the knowledge worker, powerful enough for programmers

Kofax RPA's design environment provides an interactive robot-building experience where robots are built, tested and debugged in real-time against live applications. Build bi-directional robotic automation flows, transform and enrich data, and apply business logic—all without writing a single line of code.

Intelligent screen automation for flexibility and time savings

Our Intelligent Screen Automation uses machine learning and neural network technology to streamline and accelerate robot development. Simply put, Kofax RPA can learn routine processes directly from the user's interactions. These interactions are mapped into the robot designer and, once verified, can be launched to your digital workforce. This robot design process delivers greater flexibility and saves organizations time and resources in developing and executing software robots.

Market-leading web application automation

Only Kofax has a robot design environment that integrates a browser engine to allow multiple robots to interact with a web source (e.g. web site, portal or application) and run concurrently on a single server. Our approach uniquely allows organizations to quickly, easily and powerfully build robots for web-based systems while other vendor solutions require a browser to execute a robot, which limits a single robot to run on a server or desktop at a time.

Process mining to understand business and robotic processes in real time

Our unified digital transformation solution offers document, task and process automation capabilities to effectively orchestrate your digital and employee workforce needs. Built-in process intelligence provides real-time robot monitoring, workflow insights and operational dashboards that are designed to surface process intelligence and enable process improvement over time.

Extend automation to orchestrate complex, end-to-end business processes

Extend the capabilities of Kofax RPA with features such as workflow orchestration, mobile and omni-channel, customer communications and e-signature onto a single open platform that integrates seamlessly with AI solutions such as advanced algorithms, open source machine learning like Python, natural language processing and business intelligence tools. The Kofax Intelligent Automation platform delivers the capability to completely automate and digitize end-to-end and system-to-system business processes to empower organizations to focus on business growth and strategic initiatives.

Automate Processes Across the Enterprise

Kofax RPA automates entire business processes across the enterprise, including:

Sales and Marketing	Customer Onboarding	Customer Service	Operations/ Compliance/Legal	Finance and Accounting
Competitive pricing and monitoring	New customer applications	Integration of email, call center and core systems	Screening and risk management	Vendor onboarding and maintenance
Market intelligence	Customer due diligence	Call and contact center processes	IP and fraud detection	Vendor portal queries
Data aggregation and management	Customer data management	Customer data management	Compliance reporting	Funds transfer (sweep)
CRM updates	Online registrations	Loading detailed customer info for CSR support	Policy administration and servicing	Customer onboarding and maintenance
List building	New customer eligibility	Service requests and scheduling	Credential verifications	Incentive claims
Sales quote automation	News and social monitoring—customer risk rating	Scheduled and triggered customer communications	Licensing and registrations	Pricing comps
Invoice creation and distribution	Upsell opportunity reporting	Price matching	Customer due diligence	Sales and purchase order processing
ERP automation	New customer welcome packets	Transaction automation	Outside affiliations review	Collections
Social media monitoring	Customer engagement communications	Renewal notices	Gifts and entertainment reconciliation	Report aggregation
Business intelligence reporting	Customer retention	Customer info and preferences updates	Periodic disclosures	Journal postings

Human Resources	Information Technology	Supply Chain	External-Vendors and Partners	Cross-Function
Employment history verification	Installations	Supply and demand planning	Vendor/Partner sourcing	Data entry
Employee onboarding	Server and application monitoring	Inventory management	Vendor/Partner qualification	Data extraction, aggregation, integration— websites, portals, documents, systems
Employee offboarding	File and document management	Contract monitoring and enforcing	Vendor/Partner onboarding	Report compilation and distribution
Payroll	FTP download, upload and backup	Supplier portal integration	Vendor/Partner reviews	Forms processing
Time and attendance management	User setup and configuration	Work order management	Vendor/Partner portal integration	Data and content migration
Training and education	Application integration	Order processing	Contract monitoring and enforcing	Data cleansing and verification
Compliance reporting	Data and content aggregation and migration	Shipment scheduling and tracking	Returns, repairs, recalls	Process monitoring and optimization
Employee data management	ERP and other systems integrations	Invoice, quote and contract management	Performance measurement and optimization	Data reconciliation and management
Tax management	Batch processing	Refunds and returns	Supplier/Vendor offboarding	Cognitive Document Automation (RPA + Capture)
Benefits and stock administration	Synchronizing, deleting and emptying file folders	Freight management	Supplier/Vendor agreement maintenance	Intelligent human and robotic workforce (RPA + BPM)

